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EDUCATIONAL CIRCULAR 22

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# CREATING TRAINING PROGRAMS FOR COOPERATIVE DIRECTORS

BY IRWIN W. RUST

FARMER COOPERATIVE SERVICE  
U.S. DEPARTMENT OF AGRICULTURE

**Farmer Cooperative Service  
U. S. Department of Agriculture  
Washington, D. C. 20250**

**Joseph G. Knapp, Administrator**

The Farmer Cooperative Service conducts research studies and advises with officials of farmer cooperatives, and works with cooperatives engaged in marketing farm products, purchasing farm supplies, and supplying business services. The work of the Service relates to problems of management, organization, policies, merchandising, product quality, costs, efficiency, financing, and membership.

The Service publishes the results of such studies, confers and advises with officials of farmer cooperatives, and works with educational agencies, cooperatives, and others in the dissemination of information relating to cooperative principles and practices.

**Educational Circular 22**

**July 1965**

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## Foreword

This is one of a series of circulars on directors of coöperatives. It is based on information developed during the 1964 series of member relations conferences sponsored by Farmer Cooperative Service and the American Institute of Cooperation. Theme of the conferences was The Director's Role in Member Relations.

Much of the material in this circular was taken or developed from speeches given at the 1964 conferences, or from ideas brought out during discussion periods.

This circular discusses training programs. It is intended to stimulate thinking rather than provide answers to specific problems. The ideas expressed represent opinions of responsible cooperative leaders, educators, and others, based for the most part on their own experiences in teaching or operating situations.

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# Creating Training Programs for Cooperative Directors

by Irwin W. Rust

**Membership Relations Branch  
Management Services Division**

"All cooperative businesses are highly technical nowadays and the force of competition has made managers sharpen their skills and 'know-how'. . . Sad to say, the training of directors has not kept pace," an assistant manager of a cooperative states.

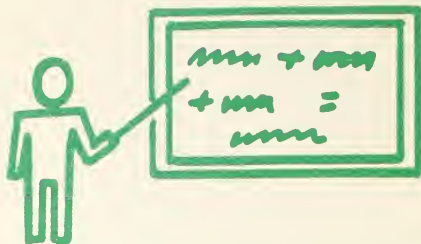
"We wouldn't think of putting an employee on the job until he was thoroughly trained and then we closely supervise him for a period of time to make sure he can perform the job correctly. But how about directors? In some organizations, all they have to do is get elected and it is assumed that they are qualified to guide the destinies of the association."

In other words, good directors are not born, they are made.

Farmer Cooperative Service has found in its work with cooperative leaders that most directors benefit from a planned training program, be it formal or informal and inherent in the conduct of the board business. Moreover, with a little encouragement, most directors accept this training willingly—and they and the cooperative both benefit.

In this publication, one of a director-oriented series, we describe several types of training programs cooperatives have found effective, quoting comments and recommendations of those who have developed and used them.

## When Should Training Start?



Informal training starts long before directors are elected to the board. One cooperative leader declares, "The training of directors begins at the time they become active members of the cooperative. This may well be many years before they are chosen to serve as directors. It is an inherent part of an ongoing program that touches every aspect of the cooperative. It involves continuous participation in the life of the cooperative."

Others speak of careful selection of nominees as the first step in director development.

A large association that agrees with this idea uses a leadership evaluation committee to measure prospective nominees. "Men who are respected for their farm management ability and have demonstrated active participation in church, school, and farm community organizations will most likely have a guiding influence with cooperative members," one manager says. "No amount of training can make directors effective without some of these basic prerequisites."

Cooperatives often schedule formal indoctrination sessions for directors after elections. Whether this is after every election, or less frequently, depends on the policies and practices of the individual cooperative.

Training is particularly desirable for cooperatives that limit the number of terms a director may serve. However, it also can be used to great advantage by all cooperatives, irrespective of their policy as to terms directors serve.

These comments from two directors who were attending a training meeting point up the need for a formal director development program.

One said, "This is a bigger job than I thought."

And the other, "No one ever told me before what a director is supposed to do."

## Who Is Responsible for Training?

In most cooperatives, the board itself has the major responsibility for planning the director training program. The president or chairman of the board may be in charge, or the program may be developed through committee assignments. Often professionals in the management field are hired to set it up.



## The Manager Advises and Encourages

Since good board-manager relations are necessary for the success of any cooperative, the manager has a vital interest in director training and development. He is frequently expected to provide much of the information used in the training program. However, he ordinarily takes a more active part in informal or on-the-job training than he does in formal indoctrination.

“Management’s most important function in director development is as ‘operations adviser’ to the board,” is the way one manager explains how he thinks he fits into the training program.

“The manager should be able to give the directors a clear picture of the present status of the operation—how well it functions, how strong the business really is . . .

“He should be able to give them sound ideas on the potential of their cooperative. He should be able to contribute greatly to planning for the future.”

A cooperative leader summarizes the manager’s training responsibility thus:

·He must:

Motivate directors to go to important meetings.

Stimulate them to become fully informed.

Activate them to accept work assignments.

Challenge them to broaden their viewpoint and accept their responsibilities.

Use them to build a stronger board and attain the organization’s goals.

Involve them in the decision-making of the cooperative.

Do all of these things with the finest means of communication at his command and the results that will be forthcoming will be because the board members *want to* and not because they have to.

## The Board Controls

An agricultural economist at a land-grant college makes this distinction between the board’s and the manager’s training responsibilities. “Indoctrination and training of directors is the board’s responsibility, not the manager’s. The only actions the manager initiates are those within the boundaries set by the board.” In other words, the manager is the hired employee of the board.

One leader gives a specific reason for the board's keeping the major responsibility for director training in its own hands. He points out that there may be instances where the hired management shows little enthusiasm for director development, where directors "are looked upon with a certain amount of paternal tolerance by the general manager and his staff. The policy seems to be that the directors should be brought into the head office every 2 or 3 months, taken to dinner, allowed to complain about a few things, and then shipped back home. . . . That's why I say that, to a considerable degree, directors must take the initiative in seeing to it that they get the training they should have."

## The Problem of Motivation

Directors are busy men and are sometimes reluctant to take the time to attend formal training programs or conferences.

The best approach to this problem is to convince the director that the training he will receive will be valuable to him personally as well as to the cooperative, one cooperative manager believes.

"If we convince him that the basic business principles involved in running a cooperative are very little different from those involved in running his own business, then we have motivation."

Another cooperative leader points out that a director serves for one or more of these reasons: (1) Protects his own investment in the cooperative; (2) satisfies his need to be "accepted"; (3) gives him an opportunity for self-fulfillment; or (4) helps fellow farmers.

He suggests that any board development program should recognize and appeal to these basic attitudes.

The manager can often be influential in motivating directors to attend formal training sessions. In the words of an agricultural extension specialist, "The manager can challenge them to be curious and to think in terms of growth of the cooperative as well as in terms of their own personal growth as directors."

## Examples of Training Programs



"The members of a cooperative board of directors have a great responsibility to the membership for the success or failure of the enterprise. Directors are usually the top people in the community. They are men of proven ability, holding the trust

and respect of their fellow members. They are ready and anxious to do a good job for their neighbors who have elected them to office, but frequently they are handicapped by lack of information, inability to interpret this information, and by inadequate experience or training in their job as directors." These are the comments of a cooperative manager.

How have cooperatives gone about supplying the training to correct these deficiencies? Let us look at some formal programs that have proved effective.

## Formal Training

By formal training, we mean that conducted through an organized, planned program outside the routine operation of the board. It is *direct* training.

A committee may visit each new director to acquaint him with his duties and responsibilities; workshops or seminars can be set up; a board manual can serve as a textbook. All these are examples of formal training.

Regardless of the approach taken, the training should provide the director with certain basic information. Every director needs to be familiar with the cooperative's bylaws and articles, its financial structure, membership requirements, and its method of operation.

And, very importantly, he needs to learn early to distinguish between board and management functions—to learn that the board is responsible for establishing policies but the manager puts them into effect. The board studies, plans, evaluates, and reviews results, but the manager handles day-to-day operations.

## The Committee Approach

A number of cooperatives have special committees which see to it that newly elected directors receive basic instruction in their duties.

One cooperative, for example, has a Director Information Committee responsible for indoctrination of new board members. The president, chairman of the executive committee, and two other board members serve on this standing committee.

It not only conducts the initial training sessions for new directors but has the continuing function of keeping directors informed of the cooperative's financial position and actions taken by special committees.

Before directors attend their first board meeting, this committee meets with them to explain their responsibilities. They have dinner together—a chance for informal discussion. The



next day, a management team explains the functions and operations of the cooperative.

In another cooperative the manager and the secretary-treasurer are responsible for the initial training of new directors. Their goal is to provide the director with all the information he will need to answer any question raised by a member concerning operation of the business.

Data covered include membership requirements; details of operating methods; audit and finances and the tax situation. The history and background of the cooperative also get some attention.

A third cooperative takes still another approach. The manager and chairman give new directors copies of the bylaws and all other published material of the cooperative, plus copies of important policies established during the last 5 years. Each director is asked to study this material and then to confer with the manager or chairman about anything that is not clear to him.

## Workshops and Seminars

Workshops and seminars, with stimulating talks and a free exchange of opinions, are excellent training tools, and are used extensively by both public and private organizations and businesses.

Some cooperatives participate in programs arranged by regional, State, or other larger associations. Others set up their own director development workshops on a local basis. Brief descriptions of some of these workshops follow.

*State Council Sponsored.*—University economists have worked with cooperative councils in several States to develop workshops for directors.

In 1963, for example, the Ohio Council of Farmer Cooperatives and the Department of Agricultural Economics and Rural Sociology of Ohio State University sponsored three 1-day training programs for directors. Attendance totaled 218. Program subjects were: Why Directors Need Training, Director Responsibilities, Formulating Policies, Planning, and Controls.

The Maryland Council of Farmer Cooperatives, Inc., and the State Extension Service sponsor manager-director workshops. Two members of the Council conducted three 3-hour seminars for boards of directors of individual cooperatives using their articles, bylaws, and financial reports for discussion. They also used the board manual prepared by Lee Garoian and Arnold Haseley of Oregon State University.<sup>1</sup> This manual

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<sup>1</sup> Garoian, Lee, and Haseley, Arnold. *The Board of Directors in Agricultural Marketing Business*. Coop. Ext. Serv., Oreg., State Univ., Corvallis. \$2.25. 1964

explains directors' responsibilities and discusses how they can best perform their duties.

For several years, United Cooperatives of Ontario (UCO) has held semiannual district meetings for directors of 140 local cooperatives, according to an official of the association. Topics range from regional-local relationships to board duties and responsibilities, credit and finance, trends in agriculture and business.

UCO also has developed several special subject workshops for directors of local cooperatives. One is on finances; another, on chairing meetings.

*Federal Intermediate Credit Bank Sponsored.*—A Federal Intermediate Credit Bank (FICB) has for many years conducted an annual 1½-day Conference for Newly Elected Production Credit Association (PCA) Directors.

The subjects covered are: History and background of organization; responsibilities of directors; rules, regulations, and bylaws; importance of member-public relations. Time is allowed for an exchange of views and ideas; there is a tour of bank offices; and there is a banquet. A special program is arranged for women.

Seventy percent of the PCA directors in the bank's district have attended these conferences—though not always when they were first elected.

Leaders of the conferences consider them quite successful. They point out, however, that while training may be done in part at the regional level, it should be supplemented at the local level for best results. For example, some directors coming to the conferences had never seen the bylaws and regulations of their PCA.

The FICB under discussion has recently started a formal program of PCA director development through a series of institutes conducted by its own staff, aided by professional management consultants.

*Other Workshops.*—An officer of a cooperative that arranges for a 2-day training session at a resort near the headquarters office whenever turnover on the board indicates a need has this to say of the sessions:

"The purpose is to get competent outside management advice and assistance in putting the role of director into its proper perspective for each board member. Sometimes those of us occupying the position are too close to it to get the full picture. That's where the outside counsel and concentrated 2-day training conference can be of great help. I know that some may consider such a device too expensive to be justified. From our experience, it may be costly *not* to spend the time and money."

A 2-day seminar sponsored by another cooperative has a different format. Each director invites a key grower in his area to accompany him.



The manager describes the workshop thus: "The program is two-fold. First we invite farsighted and provocative speakers to challenge the imagination of the group. Second, several workshops are set up to make definite recommendations to the board and to the staff. At a recent seminar we had workshops on member relations, industry relations, labor relations, and mechanization and inspection. . . . These sessions have been effective in broadening viewpoints and increasing interest in the association."

## On-the-Job Training

Informal training for directors is a continuing process. It begins before they are elected and it continues as long as they are members of the board.

One manager describes informal training as "training the board without their knowing it."

Actually, much of this training is accomplished through normal, routine board operations. Every time a director attends a meeting—serves on a committee—takes part in a discussion—he is receiving informal training.

## At Board Meetings

Attending board meetings is one phase of informal training to which nearly every director is exposed. "I know of no better way for a new director to grasp his considerable responsibility than to attend a few sessions of our board and find himself voting on multi-thousand dollar appropriations," a cooperative official comments.

*Advance Information.*—Several cooperatives recommend that before each board meeting the directors be furnished with an agenda for the meeting, current operating data, and information on any matter to be presented for action. Directors can study this material at their convenience and come to the meeting better prepared to make decisions.

Often the manager assembles this pre-meeting information. One manager says, "We expect these directors to make or approve plans—they have to know where we are now before they can make plans or set policies. We help them evaluate the balance sheet and operating statement by putting some items on a unit basis (that is, per bushel or per bale) and by making month-to-month or year-to-year comparisons."

The cooperative that has a Director Information Committee (mentioned earlier) depends on this committee to provide directors with needed data. "Minutes of the executive committee are sent to all board members after each meeting. With the minutes, the directors receive an up-to-date financial state-

ment and progress reports from special committees. Capital expenditures are explained.”

*Other Training Opportunities.*—Having directors come together for a meal before the board meeting is another suggestion for creating an opportunity for open discussion and unobtrusive board training.

Devoting a part of each board meeting to a discussion of some phase of cooperative management—something not specifically related to the routine business of the evening—also can be an effective informal training device. Some cooperatives study a section of the board manual or the bylaws.

“If 30 minutes of each board meeting were devoted to some mind-stretching study or discussion, it could revolutionize cooperatives,” declares an enthusiastic advocate of this practice.

## Through Committee Work

“If the board is to grow, directors must become involved. Giving them full responsibility in areas in which they can function and seeing that they have adequate materials with which to function can best be done, in my opinion, through the use of committees. It has been my experience that if a committee knows what it is to do, has the materials with which to work, and knows when the job is to be completed—by and large it will function.”

That is the opinion of an officer of a State association. And he adds this word to doubters—“To the amazement of managers who are reluctant to rely on committees, they will do the job far better than if the manager alone had done it.”

Putting directors to work on committees dealing with specific problems, of course, makes them more knowledgeable about cooperative operations. There is also a fringe benefit. This work is a morale builder in that it helps directors realize they can make a meaningful contribution to the association.

We know one cooperative that requires each director to attend at least one executive committee meeting a year and to attend area staff meetings from time to time. These, too, provide excellent training.

Directors of local cooperatives also serve on committees working with State or regional associations. An official of one State association reports that “Approximately half of the directors have served each year on a committee which has studied leadership, made recommendations for the board, and sought member reaction to the cooperative’s services.”

## Other Training Techniques

Cooperatives use a variety of other methods to give their directors informal training. These are but a few of the methods we have heard about.

*Reporting System.*—A monthly reporting system is favored by one large cooperative as an effective method of training directors.

An officer of the association explains the system this way. "Each major area of operations is held accountable each month to the full board. We hold our managers responsible for the future as well as the past. . . . We require a full analysis of current marketing conditions from our economist; a review of legislation by our chief attorney, a survey of membership work, and reports on special projects.

"We are not content to sit back and listen to some meaningless gobbledy-gook. If a report is obscure or incomplete, it must be redone until we understand it."

Regardless of the size of the association, clarity in reporting is a cardinal virtue. The manager's report to the board is an example.

In speaking of a manager's reports as a form of director development, an extension specialist at a State university emphasizes the importance of his communicating with the board in terms they understand.

"Effective communication requires close relationship between the manager and the board based on understanding, mutual respect, and confidence. . . . In my opinion, the manager's most difficult role is to be able to enter into a discussion to be sure progress is being made but leaving the decision-making to the board.

"Once the board appreciates that the manager can help in decisions but is not deciding on matters of policy, a long step will have been taken toward the growth and development of the board as well as the cooperative."

A thoughtful manager adds this word of caution, "When the manager presents recommendations to the board, he should encourage directors to vote their convictions. A thinking board does not always follow the manager's recommendations."

*Visiting Offices and Facilities.*—It is an old educational technique for the teacher to show the pupil what he is talking about.

Cooperatives often schedule tours of their offices and facilities for directors and members. This provides directors with an opportunity to ask questions. It gives management a chance to explain new activities and point out needed changes or improvements.

Sometimes tours of nearby cooperatives are arranged to give directors an idea of what other associations are doing.

## Special Member Relations Training

"It is imperative that the director understand he is more than a man who meets every month to discuss budgetary prob-



lems of the cooperative,” a cooperative official declares.

“He must also realize that his job is to assist the manager with member relations. How far this job should be extended is probably a controversial matter and might even be a most questioned one.<sup>2</sup> It is my feeling, however, that a good director like a good legislator should place a finger on the pulse of the members he represents. Indeed it is to represent members that he was chosen in the first place.”

Much of the preceding discussion is applicable to all phases of director training, including member relations. However, we will describe briefly here a few special member relations training activities that cooperatives have found to be effective.

## Conferences

Many local and regional associations hold special member relations conferences. For example, at a seminar sponsored by a State association, directors studied the communications media used by the association—newsletters, bulletins, and magazines—and suggested improvements. The effectiveness of the annual meeting and of smaller district meetings also was studied.

Regional cooperatives will provide more and more of these training sessions, an officer of a nationwide association believes. “The regionals have the size and strength and staff to do the job. Local cooperatives should make maximum use of these services for training their directors for effective member relations.”

## “Hot Potato” Exercises

Giving directors actual member relations problems to solve can be an effective method of stimulating both thought and discussion.

A Federal Intermediate Credit Bank that regularly sponsors director development workshops “with the thread of member relations woven throughout” reports: “We use ‘hot potato’ exercises involving real life director-member relations situations, role playing, and group discussions. The objective of the entire program is to train directors to be more effective.”

The Maryland Council of Farmer Cooperatives, Inc., employs similar techniques. An official of the Council used this problem to show board members the importance of member relations work. “I threw out the age-old question of ‘How does a director vote on an issue which is essential to the cooperative but not favored by the area he represents?’

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<sup>2</sup> Another publication in this series—Using Cooperative Directors To Strengthen Member Relations, Educational Circular 23, presents differing opinions on whether or not directors should participate actively in member relations work.

"When I explained that an issue essential to the survival or progress of the cooperative must, in the long run, help all members and should receive an affirmative vote, some seemed quite perturbed. There were such comments as 'I would never be reelected,' or 'I could never go home and face my neighbors.'

"After some discussion, it became clear to all that this was a member relations problem. Through every means of communication at their command, they had to explain and sell the members on their decision and the long-run benefits it would provide."

## Committee and Advisory Groups

Cooperatives often use committees or advisory groups to help train directors for member relations work. We cite two examples of this.

This from a Federal Intermediate Credit Bank. "We have asked each of our association's boards of directors to appoint one of their most talented directors to work with the general manager on public and member relations. . . . This brings the board more actively into planning an effective member relations program. The directors appointed have been most helpful to the general manager in getting board approval and support of programs. . . ."

And this from the secretary-manager of a cooperative. "To assist the director in member relations, we have established advisory committees of key growers. Directors serve as chairmen. Through these committees we are able to conduct a program of member relationship, with committee members becoming experts on current operating information.

"These committees are a two-way communication channel. The staff and board can secure current knowledge of field thinking and the committee members can pass on information from the staff and the board. We furnish advisory committee members with a short resume of our board meetings. We have made up a fact sheet of questions most commonly asked by members, and suggested answers. Board and advisory committee members occasionally ride with our field men. . . . This is an exceptionally good program."

## The Manager's Role

A number of cooperatives have emphasized that the manager should encourage directors to do a better job in member relations. An alert manager, for example, can help directors sharpen their member relations sense by calling their attention to a particular accomplishment—such as an especially good return on grain—which can be "communicated" to the community.



As we pointed out earlier in this circular, the manager's role in all phases of director development is largely advisory. But important!

This cooperative leader seems to have expressed the thoughts of many as to the manager's involvement in member relations training.

"The manager plays a vitally important role in the area of member relations director development. . . . I believe the manager should assist directors in understanding: (1) Their responsibility with respect to member relations; (2) the absolute necessity of giving their wholehearted support to the member relations program; and (3) the channels through which an alert and aggressive member relations program can be planned, adopted, and carried out—followed by a periodic evaluation of the program and appropriate adjustments."

## Training Aids



Newsletters, bulletin boards, and films are all recommended for use in director training.

"Newsletters from the regional cooperative to directors of local cooperatives, if interestingly written and cleverly illustrated, can be a very effective tool. It is true that not everything written is read, and not everything read is put into practice. But at least a percentage of the directors are 'scratched' by use of the newsletter technique." This is the candid comment of a regional cooperative official.

A board manual is another effective tool. Many cooperatives have their own manuals, prepared to meet their special needs and containing information about their own organization and operations. Others have high praise for the Garoian-Haseley director manual mentioned earlier in this circular.

The Cooperative League of the USA has a member education manual, developed for use by both directors and members. The League, located at 59 East Van Buren Street, Chicago, Illinois 60605, has various other publications and several films that are useful in director training.

The president of one cooperative recommends preparing a special manual on "the importance of member relations and effective ways and means of implementing the member relations programs."

Some cooperatives assemble information kits for new board members. One association uses a kit containing data on the organization, its facilities, and services; policy responsibilities

of directors; and the difference between board and staff functions. This kit also includes information on the objectives, policies, and viewpoints of the association.

A director who communicates well can be a great asset, particularly in member relations work. With this in mind, several cooperatives have arranged for their directors to take speech classes at nearby schools or have sponsored their own speech course.

Farmer Cooperative Service publications are widely used in director development programs. The Director's Role in Member Relations of a Cooperative, Educational Aid 6, and General Report 83, Directors of Regional Farmers Cooperatives, are among the popular "textbooks." The series of educational circulars on directors, of which this circular is one, is also useful.

Universities and State Extension Services are good sources of help in planning and conducting director training courses.



## Other Publications Available

Assuring Democratic Election of Cooperative Directors. Educational Circular 21. Irwin W. Rust.

Using Cooperative Directors To Strengthen Member Relations. Educational Circular 23. Irwin W. Rust.

Managing Farmer Cooperatives. Educational Circular 17. Kelsey B. Gardner.

Improving Management of Farmer Cooperatives. General Report 120. Milton L. Manuel.

Directors of Regional Farmer Cooperatives—Selection, Duties, Qualification, Performance. General Report 83. David Volkin, Nelda Griffin, and Helim H. Hulbert.

Bylaw Provisions for Selecting Directors of Major Regional Farmer Cooperatives. General Report 78. Helim H. Hulbert, David Volkin, and Nelda Griffin.

"Mr. Chairman—" Information 6.

Membership Practices of Local Cooperatives. General Report 81. Oscar R. LeBeau

Making Member Relations Succeed. Information 32. Irwin W. Rust.

A copy of each of these publications may be obtained upon request while a supply is available from—

**Farmer Cooperative Service  
U. S. Department of Agriculture  
Washington, D. C. 20250**